



Patient-Centered Outcomes Research Institute

REQUEST FOR PROPOSAL

RFP # PCO-CRMIT2013

Customer Relationship Management System

March 1, 2013

KEY DATES	
ACTION	DATE
RFP Released	February 8, 2013
Amendment 0001	March 1, 2013
Deadline for RFP Questions	February 22, 2013
Deadline for Proposals	March 14, 2013
Projected Award Date	March 18, 2013
Projected Start Date	March 20, 2013



Amendment 0001 hereby extends the proposal due date to March 14, 2013 due at 5:00 PM in order to respond to the Q&A.

Submission Deadlines requirements expanded to include Subject line information.

Opportunity Snapshot

The Patient-Centered Outcomes Research Institute (PCORI) was created to conduct research to provide information about the best available evidence to help patients, those who care for them, payers, policy makers, and others make better informed decisions. PCORI's research is intended to give patients and their caregivers a better understanding of the prevention, treatment, and care options available and the science that supports those options.

Purpose

The Request for Proposal (RFP) is for design and implementation of PCORI's Customer Relationship Management (CRM) system.

Based on PCORI's immediate needs, the organization is looking to leverage the Salesforce.com CRM tool to meet the immediate needs of its Engagement and Communication functions and then add support for other departments in a phased approach. These departments must communicate with and manage a wide variety of "stakeholders," which includes patients, clinicians, health policy representatives, insurers, scientific reviewers, grant applicants, Board of Governors members, and others.

Funds Available, Budget, and Project Periods

PCORI intends to make one award to a single Contractor but will consider other approaches, depending on RFP responses received. It is expected that the contract will be Cost Reimbursable for those expenses that are proposed, directly related to the performance of the contract, and preapproved by PCORI. Please refer to the Cost Proposal (Step 3) of the RFP for additional details.

Project funding decisions will be based on the technical approach of the proposal, commitment to and understanding of PCORI's mission and how the CRM system can help achieve PCORI's vision, and on proposed costs. Please refer to Step 4: Know the Review Criteria, for specific details about PCORI's weighting of these factors.

Responding organizations must provide:

- All expected expenditures and fees in their final bid.
- A pricing proposal that supports the entire Scope of Work outlined in the RFP and that lists key services with corresponding price quotes that are valid for at least one year from the project start date.

The expected period of performance is 18 months from the Notice to Proceed.

Organizational Eligibility

Proposals may be submitted by any private sector organization, including non-profit and for-profit organizations. The Internal Revenue Service must recognize all US organizations.

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Customer Relationship Management System

If you are interested in submitting a proposal, follow PCORI's five-step process.



1. Review the Program Detail

Examine all sections of the RFP and what makes PCORI's research different (<http://www.pcori.org/research-we-support/>).

2. Consider the Requirements

Consider the organization eligibility requirements and PCORI's specific requirements to see if your organization, your interests, and your capabilities fit this program.

3. Develop Your Solution

Design your response to accomplish the Scope of Work, satisfy the expected deliverables on time, and provide services that demonstrate cost efficiency and ingenuity. Be sure to include a cost proposal that is clear and concise, along with justification for all direct and indirect costs.

4. Know the Review Criteria

Understand PCORI's evaluation factors and how they are weighted. Details are provided in this RFP.

5. Submit Your Proposal

Compile and submit your proposal. All proposals must be submitted no later than 5 p.m. (Eastern Time) on March 14, 2013.

Step 1: Review the Program Detail

1 Scope of Work

The Contractor will create and provide PCORI with a CRM system that utilizes the Salesforce platform. The Contractor should have extensive experience with Salesforce.com and its customization, implementation, and integration. Demonstrated experience in the health, health care, health policy, and health/medical research sectors strongly preferred but not required. Experience serving not-for-profit sector strongly preferred.

The Contractor must have substantial client support capacity in project discovery, technical and information architecture, development, quality assurance, launch phases and post-launch support and offer—or be able to manage on client’s behalf or recommend—ongoing support or “service bureau” functions (including 24/7 technical support) and programming and technical enhancements as needed.

A production support model is needed to support the organization throughout the pilot period and beyond (deployment and post-go-live support).

Although the immediate interface needs are for Engagement and Communication functions, full, organization-wide implementation, integration, and acceptance of the Salesforce CRM solution will require future inclusion of the various PCORI departments into the system.

The CRM shall function principally as a repository and interface for managing, tracking, and reporting all stakeholder interactions and engagements.

The Contractor shall supply the required reports as stated in the Deliverables section of this document.

Contractor Requirements for Providing CRM Services

- PCORI wants the CRM system to serve as a platform that executes, captures, or reports on all communications from staff and Board Members to PCORI stakeholders, consultants, and scientific contractors.
- The current phase is limited to Patient/Stakeholder Engagement, Communications, and other relevant activities.
- PCORI will use Salesforce.com as its CRM system.
- Existing PCORI applications have the ability to connect and interact with Salesforce.com in order to exchange CRM-related information.

The CRM components critical for a CRM implementation:

- User experience
- Process
- Technology
- Change management
- Governance

The key business drivers are as follows:

- Manage, track, and store PCORI contacts
- Manage, track, and store PCORI campaigns and initiatives
- Integrate with other PCORI systems
- Record, manage, track, and relate communication activities
- Submit, review, and manage external stakeholder applications
- Manage social media analytics against PCORI data captured in the CRM tool
- Application security allows administrators to determine access and visibility

PCORI's key business drivers and the following important CRM application functions (Salesforce.com):

- Engagement
- Communications
- Advisory panels
- Integration
- Social media analytics
- Contact and task management

The contractor will design, develop, and implement a CRM system using Salesforce.com as the platform. During the design, the contractor will need to be aware that additional functional areas will be added during the next phase or phases of the project. The CRM system will be required to be able to perform the following functions:

- Manage, track, customize, and store PCORI contacts, accounts, campaigns, initiatives.
- Manage relationships between PCORI contacts, accounts, and campaigns, including many to many, parent-child, and organizational relationships.
- Manage and assign classifications to PCORI contacts, accounts, and campaigns.
- Track changes to data in the CRM.
- Assign teams and owners to accounts and contacts.
- Report on various relationships between entities in the CRM.
- Provide customizable reports for the end user.
- Export reports into formats such as MS Excel or Adobe PDF.

- Integrate with MS Outlook, Office 365, Constant Contact, and other PCORI systems for the tracking of communication between PCORI and contacts.
- Integrate with MS Outlook/Office 365 for calendar, distribution list, and task management.
- Allow mobile devices access to various functions of the CRM.
- Manage, track, customize, assign, and store tasks.
- Ability to upload notes and attachments against PCORI contacts, accounts, campaigns, and initiatives.
- Customization of object names to match PCORI terminology.
- Create and manage Web forms that allow for external stakeholders to populate and submit the form into the CRM.
- Manage submissions allowing for submitted forms to be related to existing contacts or create new contacts.
- Application forms should allow users to customize the look and feel of the external user interface.
- Create and manage applications for various committees, panels, and other stakeholder positions.
- Create, configure, and manage advanced workflow mechanisms to track and manage applications through preconfigured approval processes, including allowing multiple users to rank applications, triggering alerts to users when an application moves through the approval process.
- Allow uploading of attachments against an applicant's record.
- Allow external users to update their contact information with those changes tracked and reflected in their contact record.
- Allow applicants to see the status of their application through Web forms and notifications.
- Allow users related to an external applicant to submit letters of recommendation against an application.
- Easily modifiable Web forms to manage advisory panel applications.
- The CRM application should be able to integrate with an external database of government agencies/government contacts/industry information (for example, KnowWho and Hoovers).
- Ability to integrate with external business card readers, scanners, and other input devices.
- Ability to integrate with external systems, such as EasyGrants, Fluxx, Constant Contacts, BrainShark, Yammer, and ZenDesk.
- Ability to integrate with a data redundancy tool to remove duplicate contacts and accounts at the time of data migration.
- Manage social media analytics against PCORI data captured in the CRM tool.

- The CRM tool should be able to track what other contacts/accounts/organizations are saying about PCORI over social media feeds, such as Twitter and Facebook; should be able to report on social media feeds and capture metrics; and relate social media feed with appropriate contacts and accounts.
- Ability to track activities against a campaign record, thereby associating the activities to the campaigns and related accounts and contacts.
- Ability to track post-event and follow-up activities against contacts.
- Ability to allow external users to submit their comments via a Web form.
- Ability to track and manage submission of external users against PCORI initiatives.
- The CRM application should be able to categorically report on public comments.
- Ability to run analytics/reports on external users who submit comments and track that data against campaigns, contacts.
- Ability to notify users if their comments are being republished.
- Ability to track activities/appointments related to contacts, such that PCORI staff members are aware of upcoming engagements.
- Ability to segment contacts per PCORI-defined classifications.
- Ability to track if applicants have completed training and be able to relate training status to a campaign that requires it.
- Ability to send mass communications to targeted contacts.
- Ability to communicate with contacts associated with campaigns via mass e-mail.
- Ability to manage communication activities such as e-mail, phone, and meetings and relate them to accounts and contacts.
- Ability to segment contacts for the purpose of efficiently sending mass communications.
- Should track and manage follow-up communications with grant funding recipients: write-ups, monitor progress of contracts.
- Ability to manage user interface based on user role/profile.
- Application security should allow administrators to determine access and visibility.
- Ability to control report generation and visibility by user role/profile.
- Ability to manage data visibility by role.
- All Web portions of the system will be required to be Section 508 compliant.

Step 2: Consider the Requirements



Overview—Requirements for Providing a Customer Relationship Management System

The Contractor will directly manage the project, interface with key PCORI program staff members, ensure adherence to the approved budget, meet established deadlines, ensure quality control, and conclude each event with a series of recommendations for process improvement.

Program Management

The Contractor shall provide the strategic guidance, project management, personnel, equipment, technology, and design necessary to assure that the highest quality service is provided on schedule and within budget. The Contractor shall have the capability to provide a full-scale solution as described in this RFP and delivered within the time frame required. All Contractor personnel providing services under this contract shall be fluent in English and meet the following requirements. All key personnel shall be available to start on the contract start date.

Key Personnel

Senior Project Manager

The Contractor shall provide a Senior Project Manager (PM) who shall be responsible as the Point of Contact (POC) for PCORI. The PM shall have experience in the management of CRM and Salesforce.com implementation and deployment and shall have adequate authority to make decisions for the timely resolution of problems. The PM shall coordinate closely and work collaboratively with the Information Technology Department and all relevant departments within PCORI. The qualifications of the PM include the proven ability to manage complex Salesforce.com implementation and deployment projects successfully, knowledge and understanding of relationship management best practices, software and Web integration, and the ability to communicate to technical staff to manage dynamic, often iterative, technology solutions. The PM shall possess outstanding communication abilities and will be the single POC for PCORI for any and all questions, issues, and collaboration. This individual is also responsible for delivering the timely reports as described in the Deliverables section of this RFP.

Lead Software/Platform Developer

The Contractor shall provide a Lead Software Designer/Platform Developer (LSD/PD) who shall direct the technical design and build-out of the Salesforce.com solution. The LSD/PD shall have extensive experience in Salesforce.com customization, integration, and APIs. The Contractor also shall have access to all needed support to allow the timely and on-budget development of robust and complex interactive database-driven Web sites and

integrated e-mail communications systems, and maintenance of same, and a deep understanding of best practices in supporting customer communities of practice.

Other Staff

The Contractor shall provide additional highly experienced staff as needed to develop and deliver the above-described CRM system within an agreed-upon time frame and budget, including, but not limited to, an Information Architect, Graphic Designers, Database Administrators, Programmers, Coders, and Technical Writing support to create the necessary standard operating procedures. The Contractor shall propose how such staff will assist in the development, launch, and maintenance of the above-described solutions. The Contractor shall demonstrate its ability to support the variety of requests from PCORI and present its problem resolution method.

It is imperative that the Contractor demonstrates how it will identify, solicit, formally engage, and translate the input from PCORI staff and/or consultants, as well as other stakeholders, into the process of usability testing and ongoing monitoring.

Deliverables

The Contractor shall provide the following deliverables/submittals within the time frames identified below:

Deliverable	Items	Due Date
Discovery	Discovery is aimed at capturing and defining requirements and aligning project objectives with PCORI's mission.	Within 30 days of contract start date
Technical Specifications	Technical specification of proposed solution.	TBD
Information Architecture	Provide the information architecture of the proposed solution.	TBD
Design	Offeror presents design of proposed CRM platform solution for review by appropriate stakeholders.	TBD
Build-out	In the build phase, Offeror configures the application and develops the integration points and data migration processes designed in the previous phases.	TBD
Testing and QA	The testing phase applies to both the functional and technical areas and verifies that the application addresses the defined requirements. QA benchmarks are established.	TBD

Deploy and Stabilize	The deploy phase transfers the developed system into production. Post-live support continues to guarantee a stable environment and effective knowledge transfer.	TBD
Training	Offeror will provide training for users and administrators of the Salesforce.com CRM system. Training will be required pre- and post-implementation to ensure universal user acceptance and proper usage of the system.	Concurrent with the last 30 days of go-live and continuing through the life of the contract
Maintenance/Help Desk/Ongoing Support	Monthly measurement of calls, severity of issues, and a recommendation report based on call requests.	Concurrent with the last 30 days of go-live and continuing through the life of the contract
Quality Surveys	Send to PCORI Project Manager.	Provision of ongoing, QA updates commencing with solution implementation; comprehensive QA report sent to PCORI Project Manager within six months after contract award
Ad Hoc	Send to PCORI Project Manager.	PCORI may request special reports to be developed over the course of the contract with the data collected through the various channels (online, messaging, or phone)

Management Reports and Deliverables

The Contractor shall provide PCORI with management information reports. At a minimum, the Contractor shall develop the following reports at the conclusion of the contract.

Design Documentation—The Contractor shall provide PCORI with documentation for all system components, including installation instructions and operations, including startup, shutdown, logs maintenance, and diagnostics procedures. Furthermore, the Contractor shall present technically sound integration design documentation for Salesforce and any external systems used by PCORI. Integration design documentation must include structure diagrams, behavior diagrams, and interaction diagrams. Data migration design

documentation should include source and target data mapping and extract, transform, and load (ETL) functions and environments required.

Testing/QA—The Contractor shall provide a report of all the testing of the various technology components, tools, pages, e-mail solution, CRM, and all technologies required under this RFP, which will consist of bugs found and fixed, and, if not fixed, then the prescribed solution and estimated time frame for which it will be completed.

Training Considerations—PCORI will need to provide training for users and administrators of the Salesforce.com CRM system. Training will be required pre- and post-implementation to ensure universal user acceptance and proper usage of the system. An effective training plan will enhance PCORI's investment in the Salesforce.com system and its implementation. Our recommendation for training entails three major components:

1. Develop role-based curricula and customized training plans: Each type of user and/or administrator should have his or her own customized training. This will ensure targeted system awareness and usage. Certain training modules can be universal, while others should be adapted for target audience (e.g., Patient Stakeholder/Communications staff member vs. IT administrator). The implementing vendor should develop a training delivery method (i.e., instructor-led, virtual instructor-led, and so forth) to maximize efficiency and successful adaptation within the PCORI culture and working environment.
2. Prepare/develop data for training environments: The vendor will need to have a dedicated training environment/instance of Salesforce.com.
3. Conduct Train-the-Trainer activities: PCORI will need to identify and train staff for implementation. Before general staff undertake the above-detailed trainings, trainers should undergo a rigorous and thorough training process to familiarize themselves with not only the system, but also the PCORI environment in which it will be used.

Go-Live Plan—The Contractor shall work with PCORI staff on the time and date for services to be deployed and will provide the technical details in order for the IT Department to effectively convey to PCORI users that the CRM will be available and/or changing on a specified date, along with a user-friendly guideline.

Help Desk/Ongoing Support—During the course of the contract commencing during the Go-Live phase, a technology support service shall be established to accept calls, e-mail, live chat (if available), and in-person questions pertaining to the CRM system, as well as providing technology refreshes, updates, and upgrades.

Quality Surveys—Provision of ongoing QA updates commencing with solution implementation. Comprehensive QA report sent to PCORI Project Manager within six months after contract award. Further, the Contractor shall be required to survey the help desk area after questions are answered. The help desk log system shall be advanced to capture the call and solicit anonymous feedback from questioners after completion.

Quarterly Problem and Resolutions Report—A concise quarterly narrative (no more than one page) of the Contractor’s activities. This report shall identify problems and recommend solutions. The report shall include suggestions to enhance service, where appropriate. PCORI encourages interim reports, as deemed necessary by the Contractor.

The Contractor must consider electronic methods of communication of report information in order to minimize or eliminate unnecessary paperwork.

Place of Performance

The Contractor is required to provide its own facility for the services required hereunder. This function shall be staffed by the Contractor’s personnel and located at its offices.

Hours of Service

It is expected that the Contractor will be available for project support, Monday through Friday, between 8:30 a.m. and 5:30 p.m. (Eastern Time). PCORI has regular observance of federal holidays: New Year’s Day; Birthday of Martin Luther King, Jr.; Washington’s Birthday; Memorial Day; Independence Day; Labor Day; Columbus Day; Veterans Day; Thanksgiving Day; and Christmas Day.

Type of Contract

It is expected that the contract executed will be cost reimbursable for a maximum number of programmatic hours and predetermined expenses directly related to the performance of the contract and preapproved by PCORI. Please refer to the Cost Proposal (Step 3) of this RFP for additional details. Specific terms and conditions will be provided to the winning Offeror and follow PCORI’s standard contracting format. All Contractors are required to execute Non-Disclosure Agreements (NDAs) and Conflict of Interest (COI) forms prior to final contract execution.

Insurance

The Contractor, at its own expense, shall provide and maintain at least \$1 million of General Liability insurance during the entire period of performance of this contract.

Contractor’s Quality Control and Quality Assurance Surveillance Plan

The Contractor shall describe its procedures to monitor the quality of the provided services relative to the scope described herein with the goal of providing and maintaining the highest level of customer service and satisfaction. These procedures should include:

- An internal method for monitoring, identifying, and correcting deficiencies in the quality of service furnished to PCORI.
- Providing at least weekly management reports to PCORI, throughout the duration of the contract.

Service Level Agreements

It is PCORI's intent to develop Service Level Agreements (SLAs) for this effort. The SLAs will be developed post-award and as mutually agreed between the Contractor and PCORI. The SLAs, when established, may be subject to change as the Customer Relationship Management System project progresses and matures.

Quality Assurance Surveillance Plan

As a performance-based contract, the Contractor will be required to perform at an acceptable level of quality, at the minimum, to continue supporting the contract. Should the Contractor be unable to meet the requirements, the contract may be canceled due to unsatisfactory performance. The following quality guidelines will be used to measure Contractor performance. These guidelines are subject to change, if it is in the best interest of PCORI.

Quality Performance Opportunity	Quality Level		
	Exceeds	Acceptable	Unacceptable
Discovery	Offers solutions	Understands and articulates	Unable to articulate key areas
Documentation	Extensive documentation to support functionality that includes customized code and workflows (in addition to technical specifications and information architecture)	Documentation supports existing functionality (including technical specifications and information architecture)	Incomplete documentation/does not support desired site functionality
Project Management	Client provides full-time project management POC for continuous, supportive consultations with PCORI. The PM works with PCORI to understand needs, ascertain progress, and suggest innovations	Client dedicates a PM to work with PCORI, ensuring all time lines and deliverables are met	Client fails to dedicate a PM to the PCORI engagement

Deliverable Performance	Project deliverables are accurate, complete, and submitted ahead of schedule and are fully functional	Project deliverables are submitted on time and are fully functional	Project deliverables are inaccurate and/or submitted behind schedule; partial functionality and/or unresolved issues
User Training	Provides on-site training, customized manuals, help desk services, and one-on-one training as needed	Provides on-site training and manuals	Provides manuals of standard features
Status Updates	Provides weekly meetings with written progress reports including work done, work to be done, complications, and so forth	Holds a weekly meeting with written progress reports including work done	Provides sporadic progress reports with minimal details of work done
Maintenance/Help Desk/Ongoing Support	24/7 Help Desk support with an hour response time and bi-weekly reports showing the measurement of calls, severity of issues, and a recommendation report based on call requests	Business hours Help Desk support with at least a three-hour response time and monthly reports showing the measurement of calls, severity of issues, and a recommendation report based on call requests	Inadequate Help Desk coverage/support and/or reporting
Quality Surveys	Provision of weekly, ongoing, QA updates commencing with solution implementation. Comprehensive QA report sent to PCORI PM within six months after contract award and before closeout of award	Provision of monthly, ongoing, QA updates commencing with solution implementation. Comprehensive QA report sent to PCORI PM before award closeout	Inadequate reporting

Ad Hoc	Successful completion of any special reports requested to be developed over the course of the contract with the data collected through the various channels (online, messaging, or phone) completed before their predetermined deadline	Successful completion of any special reports requested to be developed over the course of the contract with the data collected through the various channels (online, messaging, or phone) completed by their predetermined deadline	Incomplete/unsuccessful completion or successful completion of any special reports requested to be developed over the course of the contract with the data collected through the various channels (online, messaging, or phone) completed after their predetermined deadline
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Compliance

Contractor is to comply with PCORI's Rules and Regulations (to be provided to awarded Contractor), all required forms, and any changes in procedures. Contractor will remain informed of any such changes and updates, as necessary, by the PCORI Procurement Office. Upon the request of employees or other persons with disabilities participating in official business, the Contractor must arrange necessary and reasonable accommodations for the impaired individuals per Section 508 Compliance.

Period of Performance

The period of performance is from March 20, 2013, until September 30, 2014. The cost proposal should support up to six months of engagement, with an option to continue an additional one year, if mutually agreed by both parties.

Non-Disclosure Agreements

The Contractor shall not release any sensitive, confidential, or proprietary information, without prior written approval from PCORI. At the time of award, the Contractor will be required to sign an NDA.

Organizational Conflict of Interest

The Contractor, upon award, shall sign a statement confirming that it does not have and will prevent any organizational conflict of interest. If a conflict arises, the Contractor will immediately advise PCORI.

Step 3: Develop Your Solution

3 Overview—Proposal Content

Your proposal should be organized into two separate volumes: Volume I to include the Technical Solution, Management Approach, and Past Performance and Volume II to include the Cost Proposal.

The Technical Solution, Management Approach, and Past Performance volume should be addressed in the first section of the proposal, which should be no longer than 10 pages. Additional detail—project team bios, list of other Salesforce.com sites, and so forth—may be included in the appendix (exclusive of the title page and table of contents) and sent via the acceptable formats noted in Step 5 of this RFP.

Technical Solution

The Offeror shall demonstrate and describe its proposed solution, based on the requirements in the Statement of Work. Proposals should include the information outlined in this section; our ability to interpret and apply your proposal to these questions will factor into our decisions.

1. Describe in detail the Offeror's proposal to address the requirements outlined in this RFP:
 - a) Explain the process you will follow to design and implement the CRM solution, delineating the design work separate from the development work.
 - b) Address important technology information and specifications used in your solution, and be sure to include a detailed explanation of why you are recommending a specific course of action. Please address your firm's experience with the technology you are recommending, examples of other sites you have created using Salesforce.com, as well as any hardware/software vendor partnerships.
2. Provide a time line for the completion of this proposal; if the project involves a multi-phase approach, please provide approximate time frames.
3. Describe the fee structure and how the organization will invoice PCORI. This must encompass all design, development, and software acquisition and licensing fees necessary for the development and maintenance of the site. The proposal should categorize costs separately as design costs, build costs, implementation/content migration costs, maintenance costs, and software licensing costs. Also include the firm's plan for post-deployment maintenance, support, and upgrades, including hourly rates for services.
 - a) Break down cost by production hours, tools, and functionalities.

- b) Provide an estimate of ongoing costs for maintenance and support.
 - c) All proposals must include a hosting solution, whether that solution is provided by the company or a third-party service provider. Please detail the cost structure, hosting platform, uptime statistics, location of the server, data backup and integrity plan, and so forth. Clearly identify additional costs incurred with a change in hosting site.
 - d) Identify costs to train our staff to use site tools and provide a style guide.
 - e) Identify whether there will be other expenses, consulting fees, future work, and so forth to complete this project.
4. Provide a brief history and profile of the firm and its experience providing services for organizations similar to ours (i.e., other non-profits, funding organizations, research institutes, or think tanks). Provide a list of the firm's clients comparable to our organization; include contact name, telephone number, Web site location, services provided, and length of service.
 5. Describe the project process and methodology, including sample deliverables from past projects of similar size and scope. Document examples of the firm's experience in designing/developing each of the project requirements.
 6. List the project team (including programmers and designers) and short biographies of each team member. If using freelancers or outside resources, please indicate them as such; we reserve the right to approve/disapprove of selected resources. Indicate how many full-time staff your firm employs.
 7. Please provide an unsigned copy of your standard service contract for our review and any additional stipulations of which we should be aware.

Management Approach

The Offeror shall demonstrate the ability to effectively manage and control the operation through completion of products/deliverables by demonstrating successful program support. The Offeror shall provide information about program management, financial resources or ability to obtain them, equipment and facilities, quality assurance approach, internal controls, and staffing.

- Key personnel resumes should be no longer than two pages and are not included in the page count.
 - The qualifications of the Program Manager (PM) include the proven ability to successfully manage complex Salesforce.com customization projects; knowledge and understanding of Web site and portal development and e-mail protocols; the ability to communicate to technical staff to manage dynamic, often iterative, technology solutions. The PM shall possess outstanding communication abilities

and will be the single POC for PCORI for any and all questions, issues, and collaboration. This individual is also responsible for delivering the timely reports as described in the Deliverables section of this RFP. Creativity, innovation, and passion are key criteria for this role.

Past Performance

The Offeror shall also identify up to three previous or existing clients within the last five years with a similar effort in the commercial or federal market. Include client name, period (dates) of performance, the POC name/e-mail/phone number, and a synopsis of work performed.

Cost Proposal

A Cost Proposal should be distinct and separate from the aforementioned narrative. The Technical proposal (with cover letter) and Cost proposal should be submitted in the same e-mail, but as separate documents. Offerors are advised to create and submit separate files for each proposal. PCORI expects to make one award to a single Contractor but will consider more than one contractor, dependent on specific expertise. It is also expected that the contract will be cost reimbursable for a maximum number of programmatic hours and predetermined expenses that are directly related to the performance of the contract and preapproved by PCORI. Although project funding decisions will be based on the technical approach of the proposal, responding organizations must include all expected expenditures, indirect costs, and fees in their final bid. Travel is not expected for the successful performance of this contract. However, Offerors may propose travel costs in support of the proposed Scope of Work that must receive prior approval and will be reimbursed, at cost. Organizations must provide a pricing proposal that supports the entire Scope of Work outlined in the RFP and that lists key personnel and key services with corresponding price quotes that are valid for at least one year from the project start date. If needed, a brief budget narrative (no more than two pages) may be included to clarify unusual budget items or calculations. The Cost Proposal does not count toward the page count limitation. Nevertheless, this section should also conform to PCORI's formatting requirements, as noted in this RFP. The cost proposal should include the following components of the overall project:

1. Discovery
2. Technical specifications development
3. Information architecture
4. Design
5. Build-out
6. Testing and QA
7. Deploy and stabilize
8. Training
9. Maintenance/help desk/ongoing support



10. Quality surveys

11. Ad hoc

Step 4: Know the Review Criteria

4 Overview—Review Criteria

An award will be made to the Offeror who proposes the best value, with the technical solution being more important than the management approach, past performance, and price, as determined by the Scope of Work outlined in the previous sections and the following evaluation factors, and as indicated in the matrix below.

PCORI reserves the right to reject proposals that are unreasonably low or high in price. Price will be evaluated for cost realism. The price will be determined with regard to the fulfillment of the requirements based on Step 1. PCORI will determine the Offeror's acceptability by assessing the Offeror's compliance with the terms of the RFP.

Rating Factor Matrix

Transaction Description	Weight of Rating Factor
Technical Proposal	30%
Past Performance	25%
Management Approach	25%
Cost Proposal	20%

Evaluation Categories

Outstanding—The Offeror has demonstrated that there is a high probability of success in a combination of past results, low risk, and professional distribution of services.

Good—The Offeror has demonstrated that there is a good probability of success in a combination of past results, moderate risk, and professional distribution of services.

Fair—The Offeror has demonstrated that there is marginal probability of success in a combination of past results, marginal risk, and professional distribution of services.

Poor—The Offeror has not demonstrated that there is a probability of success in this services-based effort.

Best and Final Offers

Subsequent to receiving original proposals, PCORI reserves the right to notify all technically acceptable Offerors within the competitive range and to provide them an opportunity to submit written Best and Final Offers (BAFOs) at the designated date and time. BAFOs will be evaluated and considered at PCORI's discretion. After receipt of a BAFO, no discussions will be reopened unless PCORI determines that it is clearly in PCORI's best interest to do so (e.g., it is clear that information available at that time is inadequate to reasonably justify Contractor selection and award based on the BAFOs received). If discussions are reopened, PCORI will issue an additional request for BAFOs to all technically acceptable Offerors still within the competitive range.

At its discretion, PCORI reserves the right to also invite Offerors who are technically acceptable to conduct a presentation to PCORI on the proposed effort for technical and management approaches identified in the submission. PCORI will notify vendors who meet the qualifications and provide the date, time, and format for the presentation. PCORI expects to fund one proposal. However, PCORI reserves the right to fund more than one proposal or to fund no proposal if, in its judgment, an acceptable proposal is not identified.

Step 5: Submit Your Proposal



Overview—Summary of Instructions

Each proposal submitted must conform to the following instructions.

Format

All text should be Arial or Times New Roman font, no less than 11 points with one inch margins and single spaced. Graphics and tables are acceptable and encouraged; MS Word, MS Excel, or Adobe PDF formats. Proposals exceeding the 10-page limit (exclusive of the title page and table of contents) will not be considered.

The submitted proposal must explain in detail the approach that the designated team would take to complete this work. This could include, but is not limited to, an outline of the design process, technical specifications, software, proposed work plan including major project milestones time line and fee structure, firm profile and history, proposed plans to subcontract operational and support services for completion of work, as well as the specific tasks to be assigned exclusively to each team member. The proposal should also detail service and maintenance options and costs, and options for additional development work after the testing and QA period is complete.

This information should be provided in a table format included in the specified page limit.

The submitted proposal must include a description of the composition of project team, including key personnel and consultants, by creating a table that provides information about the time commitment to the project by each member and area of expertise and experience. For each team member, include a resume that is no longer than two pages and is not included in the total page count.

Cover Letter

The cover letter must contain the following information:

- Offeror's name and mailing address
- Reference to the solicitation (RFP) number (PCO-CRMIT2013)
- Technical and contract points of contact—name, phone number, and e-mail address
- Business size (Large, Small, State/Federal Certifications—MBE, 8(a), HUBZone, and so forth)
- Dunn & Bradstreet Number (DUNS)
- Federal Tax ID (EIN, TIN, SS)
- Affirmation that the quote (cost proposal) is valid for at least 30 days

- A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item
- Acknowledgement of any amendments by reference

Proposal

Ensure that your proposal contains the requisite two volumes (please refer to Step 3 that describes Volume I to include Technical Solution, Management Approach, and Past Performance and Volume II to include Cost Proposal), conforms to the format and content instructions, and addresses the Scope of Work and all deliverables.

Submission Deadlines

- Questions should be addressed and submitted to rfp@pcori.org, referencing the RFP number in the subject line, NO LATER THAN 5 p.m. (Eastern Time) February 22, 2013. Questions need to have the solicitation number in the Subject line of the e-mail.
- Closing date—All proposals should be sent NO LATER THAN 5 p.m. (Eastern Time) March 14, 2013, to rfp@pcori.org with the RFP number clearly listed in the subject line. The proposal needs to have the solicitation number in the Subject line of the e-mail.

Anticipated notice of award date: March 28, 2013.

Late Submissions

Late proposals, requests for modification, or requests for withdrawal will not be considered, unless a late modification of a successful proposal makes terms more favorable for PCORI.

Retention of Proposals

All proposal documents will be the property of PCORI and retained by PCORI, and, therefore, will not be returned to the Offerors.

Withdrawal or Modification of Proposals

An Offeror may modify or withdraw its proposal upon written, electronic, or facsimile notice if received at the location designated in the solicitation for submission of proposals, but not later than the closing date and time for receipt of proposals.

About PCORI

The Patient-Centered Outcomes Research Institute (PCORI) is an independent organization created to help people make informed healthcare decisions and improve healthcare delivery. PCORI will commission research that is guided by patients, caregivers, and the broader healthcare community and will produce high integrity, evidence-based information.

PCORI is committed to transparency and a rigorous stakeholder-driven process that emphasizes patient engagement. PCORI will use a variety of forums and public comment periods to obtain public input throughout its work.

Our Mission

PCORI helps people make informed healthcare decisions and improves healthcare delivery and outcomes by producing and promoting high integrity, evidence-based information that comes from research guided by patients, caregivers, and the broader healthcare community.

Our History

PCORI was created by the Patient Protection and Affordable Care Act of 2010 as a non-profit, nongovernmental organization. PCORI's purpose, as defined by the law, is to help patients, clinicians, purchasers, and policy makers make better informed health decisions by "advancing the quality and relevance of evidence about how to prevent, diagnose, treat, monitor, and manage diseases, disorders, and other health conditions."

The statutory language defining PCORI is broad and authorizes research that will support a strong patient-centered orientation, inform better choices among alternative treatment and prevention strategies, and direct attention to individual and system differences that may influence strategies and outcomes. PCORI was designed to produce knowledge through the analysis and synthesis of existing research or the support of new research.